

Setting Up and Processing Online PDF Forms

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What are online forms?

The purpose of online forms is to make documents available on an agency's website which can be filled out online, and submitted back to the agency. The forms must be developed using Adobe Acrobat Version 4.0 or above. Complicated forms can be formatted using Word or Excel, and then printed to PDF. Once the form is in PDF format, Adobe Acrobat is used to define the fields where the users will input data onto the form.


The only requirement for users filling out each form is the installation of Adobe Acrobat Reader Version 4.05 or above. It is recommended that users are informed of this requirement on each agency's website.

When the user fills out a form, the submit button activates an ASP application which bundles the input data into a file, and e-mails it to a designated receiver for the specific form. The data file is sent to the designated receiver's e-mail address as an attachment. This attachment is an .fdf file. When the agency receiver double-clicks on the attached .fdf file in Outlook, the data will automatically be displayed in the associated .pdf document in the Adobe Acrobat Reader.

In order to save the filled out form for future reference, the .fdf attachment must be saved.

How to Begin

The PDF form will reside on your Agency's website. In order for the submit function of the PDF form to function properly, it must conform to the standards described below.

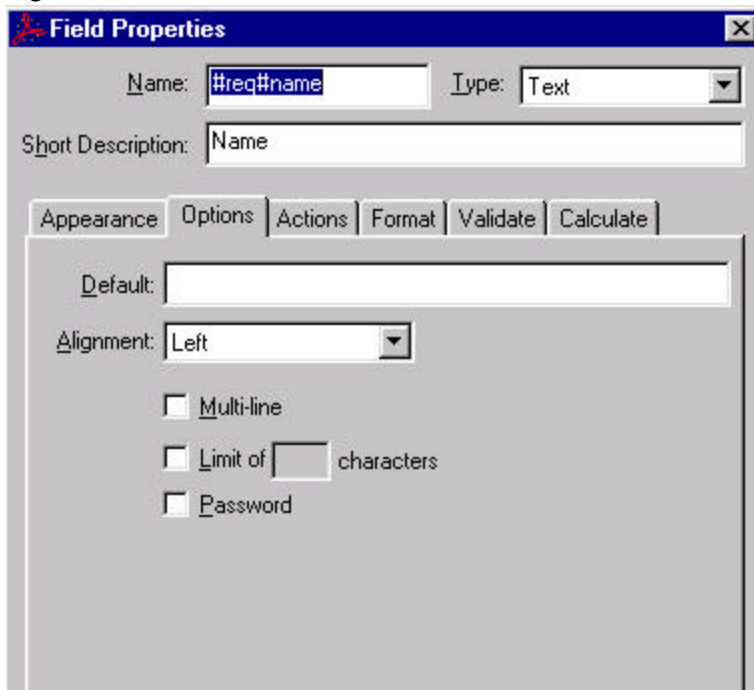
If you have created your PDF document, using Word or Excel, open up the PDF document in Adobe Acrobat. Click on the Adobe Acrobat Form Tool () to begin defining the input fields of your form.

Click on the area of the form where you want to place your first input field, and a Field Properties window will open.

To define a required field:

Any field that is required must have "#req#" appended to the beginning of its name. The naming of the fields on the form is important because this ultimately affects the data processing by the ASP page (which is activated by the Submit button). In Figure 1 below, there is a required "Name" field. This field has been named "#req#name". Select "Text" as the field Type. When the user completes the form and presses the Submit button, if any of the required fields are not filled out, the user will receive an error message. It is recommended that required fields are indicated on the form (by using an asterisk or highlighting), so that they can be easily identified.

Figure 1

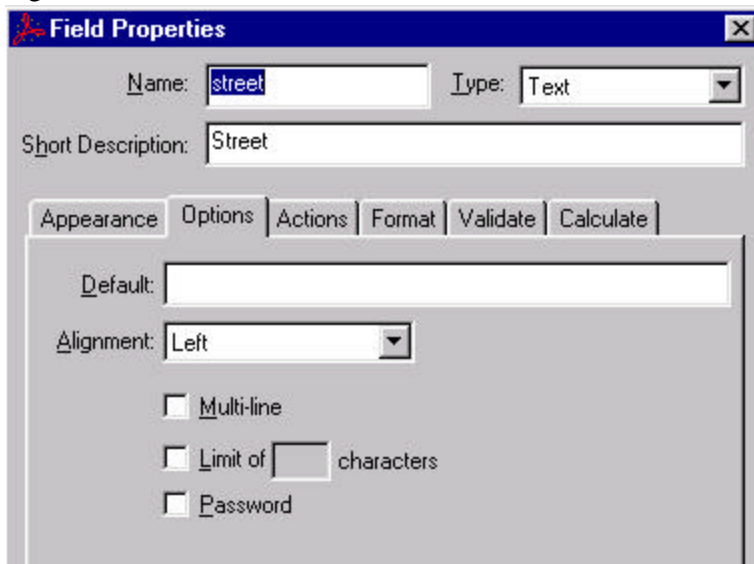


The 'Field Properties' dialog box shows the configuration for a text field. The 'Name' field contains '#req#name' and the 'Type' dropdown is set to 'Text'. The 'Short Description' field contains 'Name'. The 'Appearance' tab is selected, showing a 'Default' text input field, an 'Alignment' dropdown set to 'Left', and three unchecked checkboxes: 'Multi-line', 'Limit of' (with an empty text box), and 'Password'.

To define a non-required field:

To define a non-required field, a simple naming convention can be used. Select “Text” as the field Type. In Figure 2 below, a non-required street address field is defined.

Figure 2



The 'Field Properties' dialog box shows the configuration for a text field. The 'Name' field contains 'street' and the 'Type' dropdown is set to 'Text'. The 'Short Description' field contains 'Street'. The 'Appearance' tab is selected, showing a 'Default' text input field, an 'Alignment' dropdown set to 'Left', and three unchecked checkboxes: 'Multi-line', 'Limit of' (with an empty text box), and 'Password'.

The Appearance and Options tabs can be used to define field properties such as borders and alignment of input text.

To define the Submit button:

Using the Form Tool, click on the area of the form where you want to place the Submit button. The Field Properties window will open.

The Submit button's name will be "#np#Submit", and must be named in this manner for the form to be processed. The Submit button created on the PDF form will be linked to the ASP page that will process the data.

Field Type must be set to "Button". Click on the Appearance tab. Select the desired background color and attributes for the border of the button. In the Common Properties area of this window, be sure that the Form Field is set to "Visible but doesn't print". This will allow the Submit button to show up on the Internet version of the form, but will cause the Submit button to not display on the printed version of the document.

Click on the Options tab. For the Highlight option, select "Push". For Layout, select "Text Only". Under Button Face When, select "Up". In Button Face Attributes Text, type "Submit".

Click on the Actions tab. Click on the "When this happens..." "Mouse Up" option. Click on "Add". In the Action Type pull-down menu window, select "Submit Form", and a Select URL button will appear. Click on the "Select URL" button. A Submit Form Selections window will open. Enter the following URL:

<http://www.doa.state.la.us/emailform/ProcessPDFData.asp>

Export Format must be set to "HTML Form". Under the Field selection options, the "Include All Fields" option must be checked, and the "All Fields" button must be selected. Click on OK to save all settings.

There are three additional fields that the PDF form must contain in order for the ASP page to function properly:

#req#uemail - This is where the User will enter his/her e-mail address (see instructions above for defining a required field). Since this is set up as a required field, the application will return an error message to the user if this field is not filled out on the form. When the form is submitted, it will appear as if the User had e-mailed it (the #req#uemail address will appear in the "From" field of the e-mail message).

#req#remail - This needs to be set up as a hidden field. In order to define a field as hidden, go to the Appearance tab of the Field Properties window, and under the Common Properties settings, make sure that Form Field is set to "Hidden". Click on the Options tab. In the Default field, enter the email address of the person at your agency that will be receiving the forms (Example: jdoe@doa.state.la.us). Hidden fields do not display on the PDF document when it is migrated to the Internet. This field should contain the destination e-mail address of the completed form. When a User fills out the form, the form will be submitted via e-mail to this address.

#np#response - This is the URL of the page that the user will be returned to when the form has been successfully submitted. This can be a "Successful Submission" page, or another page at the Agency's website where the user is returned to. Under the Appearance tab, define this field as a hidden field. Under the Options tab, enter the URL of the page that the user will be sent to after successful submission.

Sample Basic Form: http://www.wapptest/intranet/web_dev_guide/OnlineForm.pdf